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# **Tourism Committee**

**Tuesday, October 18, 2005  
1:00 PM  
306 HOB**

**Allan G. Bense  
Speaker**

**Rep. Nancy Detert  
Chair**

## **TOURISM COMMITTEE**

**Tuesday, October 18, 2005**

**1:00 pm – 3:45 pm**

**306 HOB**

- I.     **1:00 pm     Call to Order**
- II.             **Remarks by Chairman**
- III.            **Overview of Tourism Committee Interim Projects:**
  - A. Florida's Entertainment Industry Infrastructure: Are We Growing the Indigenous Industry as well as Supporting Production?***
    - **Judy McDonald, Staff Director  
Tourism Committee**
  - B. Florida Commission on Tourism & VISIT FLORIDA: A Review After 10 Years (1996-2006)***
    - **Judy McDonald, Staff Director  
Tourism Committee**
  - C. Sports Economic Development in Florida***
    - **Jennifer Langston, Legislative Analyst  
Tourism Committee**
- IV.            **Presentations on Cause, Duration, and Impact of Red Tide, Including a Discussion of the Effects of Red Tide on Tourism:**
  - **Gil McRae, Director  
Fish & Wildlife Research Institute  
Fish & Wildlife Conservation Commission**
  - **Andrew Reich, MS, MSPH  
Program Coordinator  
Aquatic Toxins Program  
Division of Environmental Health  
Department of Health**
  - **D. T. Minich, Chairman  
Florida Association of Convention & Visitors Bureaus  
Executive Director, Lee County Visitor & Convention Bureau**
  - **Bud Nocera, President & CEO  
VISIT FLORIDA**
- V.     **3:45 pm     Adjourn**

## PRESENTERS

**Gil McRae**, Director  
Fish & Wildlife Research Institute  
Fish & Wildlife Conservation Commission

**Andrew Reich**, MS, MSPH  
Program Coordinator  
Aquatic Toxins Program  
Division of Environmental Health  
Department of Health

**D. T. Minich**, Chairman  
Florida Association of Convention & Visitors Bureaus  
Executive Director, Lee County Visitor & Convention Bureau

**Bud Nocera**, President & CEO  
VISIT FLORIDA

## PERSONS IN AUDIENCE

**Jerry Brooks**, Deputy Director  
Division of Water Resource Management  
Department of Environmental Protection

**Sherman Wilhelm**, Director  
Division of Aquaculture  
Department of Agriculture & Consumer Services

**Barry Pitegoff**, Vice President  
Research  
VISIT FLORIDA

*or*

**Vicki Allen**, Research Manager  
VISIT FLORIDA

**Cliff Nilson**, Vice President  
Governmental Relations  
VISIT FLORIDA



**Florida House of Representatives**  
**Proposed 2005-2006 Interim Project**

**Council/Committee:** State Infrastructure Council/Tourism Committee

**PROJECT TITLE:**

*Florida's Entertainment Industry Infrastructure: Are We Growing the Indigenous Industry as well as Supporting Production?*

**STAFF WITH PRIMARY RESPONSIBILITY FOR COMPLETION:**

Judy C. McDonald

**PROBLEM STATEMENT:**

The Office of Film and Entertainment (OFE) in the Governor's Office of Tourism, Trade and Economic Development is responsible for promoting and developing the state's entertainment industry. Included in this responsibility, among other things, is the promotion and marketing of the state as a site for production; the promotion of our indigenous entertainment industry and producers; and servicing businesses, communities, organizations, and individuals engaged in entertainment industry activities. These activities are to be guided by the statutorily required 5-year strategic plan developed by the OFE with the advice of the Florida Film and Entertainment Advisory Council.

In 2000, 2001, and 2003, incentives were provided statutorily for the entertainment industry to encourage the state as a site for production. The first and second involved making a reimbursement of sales taxes an upfront exemption for qualified productions. The next was a financial incentive in 2003 to encourage the use of the state as a site for filming, and for providing production services for, motion pictures, made-for-television movies, commercials, music videos, industrial and educational films, and television programs by the entertainment industry. The incentive also provided a mechanism to encourage relocation of entertainment industry businesses to the state; however, no relocation projects have received funding. The financial incentive fund received funding in FY 2004-05 of \$2.45 million and in FY 05-06 of \$10 million. The incentives are available for both indigenous and out-of-state film productions.

Questions have arisen concerning the long-term growth potential of the entertainment industry in the state:

- As we continue to raise our incentive amount for production, how do we compare with what other states are doing to increase their market share? What, if anything, do we need to consider doing in order to maintain or increase our market share? Is it worth our investment long-term?
- What are our state's entertainment industry infrastructure needs, short-term and long-term? How and when should these be addressed?
- What, if anything, is being done to encourage the relocation of entertainment industry companies to Florida? What should be done? What are other states doing?
- What is being done and what needs to be done to grow our indigenous entertainment industry? What are or should be the long-term goals of the state in this area?

## PURPOSE OF THE PROJECT:

Questions have arisen concerning the long-term growth potential of the entertainment industry in the state. The project will attempt to answer the questions posed above in order to assist Members to have a better understanding of the depth and breadth of the entertainment industry sector in the state and the needs of that industry to continue to grow and be competitive in the future. This will entail not only looking at current production incentives that bring productions to the state, but also at how the state can grow the industry base and product in Florida.

Staff will review other state laws to determine what is being done to address these issues in their states. Staff will concentrate on the states viewed as our major competitors. Additionally, staff will meet with OFE, the Florida Film and Entertainment Advisory Council, representatives of the state's Film Schools, and representatives of segments of the entertainment industry sector in Florida. Finally, staff will be reviewing literature and studies related to these issues.

## EXPECTED FORMAT FOR OUTCOME:

The final work product will be a formal report. Both legislation and recommendations for funding are possible outgrowths of the report.

## ANTICIPATED TIMEFRAMES:

June – September	Project plan completed; research and information solicitation
September	Initiate research analysis
September 9, 2005	Progress report to Chair and to Speaker's Office
October – November	Complete analysis; draft report prepared; information provided to Chair
December – January	Report finalized; Legislation and/or other materials required as outgrowths of report drafted for Committee
January 13, 2006	Interim project report completed.

Note: Progress reports on projects will be provided to Committee Chair at different intervals during the process, not just the specific times noted above.

## QUESTIONNAIRE ON FLORIDA'S ENTERTAINMENT INDUSTRY

The following are questions concerning the short-term and long-term growth potential of the entertainment industry in the state that are included in the House Tourism Committee interim project proposal entitled, *Florida's Entertainment Industry Infrastructure: Are We Growing the Indigenous Industry as well as Supporting Production?*

Because of your knowledge and experience in the entertainment industry, your thoughts on these issues would be greatly appreciated.

### Entertainment Industry/Incentives

1. As we continue to raise our incentive amount for production, how do we compare with what other states are doing to increase their market share?

What, if anything, do we need to consider doing in order to maintain or increase our market share?

Is it worth our investment long-term?

2. What are our state's entertainment industry infrastructure needs, short-term and long-term?

How and when should these be addressed? (Is there a sequence in which the needs should be addressed?)

3. What, if anything, is being done to encourage the relocation of entertainment industry companies to Florida?

What should be done? What are other states doing that you think Florida should consider?

4. What is being done and what needs to be done to grow our indigenous entertainment industry?

What are or should be the long-term goals of the state in this area?

5. What role can the state's post-secondary schools -- FSU, UCF, UM, Valencia, Full Sail -- play in addressing these issues?

### Office of Film and Entertainment

6. With the continued growth in responsibilities of the OFE, is the current staffing level sufficient to meet the current needs (statutory requirements and industry needs)? To meet the long-term needs of the state in this area?
7. If not, what do you recommend and what is the rationale for your recommendations?

8. There has been some discussion concerning an office in New York like the one in Los Angeles. Is this, in your opinion, warranted? If so, why? If not, why not?

Please provide any additional information that is not addressed by the questions above.

If you have any questions, please contact Judy McDonald, Staff Director, Tourism Committee, Florida House of Representatives, at 850/488-9406 or [judy.mcdonald@myfloridahouse.gov](mailto:judy.mcdonald@myfloridahouse.gov).

Thank you for your response.



**Florida House of Representatives**  
**Proposed 2005-2006 Interim Project**

**Council/Committee:** State Infrastructure Council/Tourism Committee

**PROJECT TITLE:**

*FLORIDA COMMISSION ON TOURISM & VISIT FLORIDA: A REVIEW AFTER 10 YEARS (1996-2006)*

**STAFF WITH PRIMARY RESPONSIBILITY FOR COMPLETION:**

Judy C. McDonald and Jennifer Langston

**PROBLEM STATEMENT:**

The problem statement is multifaceted; however, all aspects relate to determining how the Florida Commission Tourism (commission) and its direct support organization, VISIT FLORIDA are functioning as the state's tourism promotion and marketing arm. It entails a review of compliance with current law as well as a determination of the adequacy of the law after ten years of existence as a public-private partnership. Included in this, is a review of the long-term vision for the state's tourism marketing and promotion efforts that has been identified by these entities so that the Legislature can provide input, if needed, and can monitor the efforts and the need for additional public funding. Finally, it includes a review of the entities efforts to address the impact of the 2004 hurricanes on Florida tourism and a determination, if possible, of the effect of those efforts.

Although there have been three OPPAGA reviews of the ability of the Florida Commission on Tourism (commission) and VISIT FLORIDA to comply with outcome measures, there has not been a legislative review to determine overall compliance with requirements of the law nor to determine if, after 10 years of existence, provisions of the law need to be updated. One possible example is the county composition of, and number of, tourism regions specified in law which are required for consideration for 4-year appointments of 17 commission members by the Governor.

Three changes in law governing the commission were made in the 2005 Session to address some identified needs. These changes need to be monitored over the interim to determine if they accomplish the intended outcomes.

Even before the commencement of the Regular 2005 Legislature, the House Tourism Committee held one meeting and one hearing on the impact of the hurricanes on the Tourism industry and infrastructure in Florida and proposals for addressing the short-term and long-term needs of the state and impacted local communities. These meetings were the only in-depth discussions on the tourism industry issues and their impacts on state and local revenues that were held prior to the Special Session Call. They set the stage for a discussion of funding. Although no funding was specifically appropriated to assist in the tourism initiatives proposed to keep tourists and convention business coming to the state, House leadership was instrumental in working with the Governor to secure \$4.75 million in increased revenue to help bolster Florida's tourism marketing campaign.

Those funds along with an additional \$1.4 million made available by freezing select VISIT FLORIDA programs (a decision made by the board of directors) brought the total available funding to \$6.15 million. The funds were to be used to enhance the state's marketing program to reach both leisure travelers and meeting planners, to encourage meetings and conventions, and to provide grant

funds for areas hardest hit by the hurricanes. The focus of the marketing efforts was to be geared toward improving perceptions on travel to Florida specifically during June through November 2005.

#### PURPOSE OF THE PROJECT:

The purpose of the project is to provide Members with information on the commission and VISIT FLORIDA's compliance with current law, on the need for any changes in law to address changes in the state and the tourism industry over the last ten years, on long-term tourism marketing and promotion initiatives that could impact public financial participation, and on the use of funds for hurricane recovery and, if possible, the effectiveness of those funds.

Research by staff will include review of statutes governing the public-private partnership; review of partnership contracts; review of marketing plans, proposals, and budgets; interviews of VISIT FLORIDA staff and members of the board of directors; interviews of OTTED staff; and, interviews of persons in select areas of the state who are knowledgeable of and involved in the tourism industry in their local communities.

#### EXPECTED FORMAT FOR OUTCOME:

A formal report on the Commission with a white paper on the use of dollars for marketing post-2004 hurricanes, one all inclusive formal report, or two white papers

#### ANTICIPATED TIMEFRAMES:

June – September	Project plan completed; research and information solicitation
September	Initiate research analysis
September 9, 2005	Progress report to Chair and to Speaker's Office
October – November	Complete analysis; draft report prepared; information provided to Chair
December – January	Report finalized; Legislation and/or other materials required as outgrowths of report drafted for Committee
January 13, 2006	Interim project report completed.

Note: Progress reports on projects will be provided to Committee Chair at different intervals during the process, not just the specific times noted above.

**Florida House of Representatives**  
**Proposed 2005-2006 Interim Project**

**Council/Committee:** State Infrastructure Council/Tourism Committee

**PROJECT TITLE:**

*Sports Economic Development in Florida*

**STAFF WITH PRIMARY RESPONSIBILITY FOR COMPLETION:**

Jennifer Langston

**PROBLEM STATEMENT:**

Since the disbanding of the Department of Commerce in 1996, the responsibility for amateur and professional sports economic development and analysis has been under the purview of the Florida Sports Foundation (Foundation). The Foundation is a direct support organization under the direction of the Governor's Office of Tourism, Trade, and Economic Development (OTTED). In 1999, increased responsibilities for amateur sports and responsibility for physical fitness were statutorily given to the Foundation. Since that time there has not been an in-depth review of the Foundation by the Tourism Committee.

During the 2005 Legislative Session, the Tourism Committee heard testimony from various sports interests touting the importance of amateur and professional sports to the economic development of the state and of local communities. One of the many concerns discussed was that other states and locales were attempting to take some of our state's market share of amateur and professional sports economic development. The Foundation stated that Florida's long history of sports is important to our economic development. Presenters, including an economist from Florida State University, stated that whether it is Arizona attempting to lure spring training franchises or Las Vegas, Nevada tempting the Florida Marlins to relocate, it is important to investigate competition and what types of incentives are being offered by other states to lure Florida's sports industry--whether professional or amateur.

**PURPOSE OF THE PROJECT:**

This project will seek to accomplish two key goals:

- to research the Florida Sports Foundation to determine if it is meeting the statutory requirements set out in the reorganization of 1996 and subsequent statutory requirements increasing its responsibilities in the area of amateur sports and physical fitness, and
- to determine what types of incentives encouraging growth of the sports industry are being offered by competing states and how these compare with what Florida offers.

Included in the second goal is a review of current studies and literature to determine what, if any, data exists to show economic rate of return on dollars invested for both the state and local communities. This project will also examine laws of Florida and other states. The information will provide a means for Members to determine if any changes are needed in law, rule, or procedure.

The methodologies to be used to conduct the fact-finding interim project include a possible survey, interviews, literature review, and Internet research. In addition, meetings will be held with OTTED, Florida Sports Foundation, other state and local governmental offices, and sports industry representatives.

### EXPECTED FORMAT FOR OUTCOME:

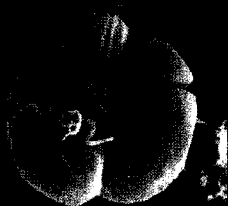
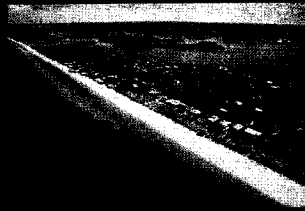
The final work product will include a formal report. Legislation and recommendations for funding are possible outcomes of the project.

### ANTICIPATED TIMEFRAMES:

June	Project proposal completed and research begun
July – September	Information solicitation and review
September 9, 2005	Mid-term progress report to Speaker's Office and Chair
October – November	Analyze information; prepare draft report; update Chair
December – January	Finalize report; draft any legislation or other materials as directed by Chair and/or Committee
January 13, 2006	Report is finalized.

Note: Progress reports on projects will be provided to Committee Chair at different intervals during the process, not just the specific times noted above.





*Karenia brevis*  
1/1000 inch wide

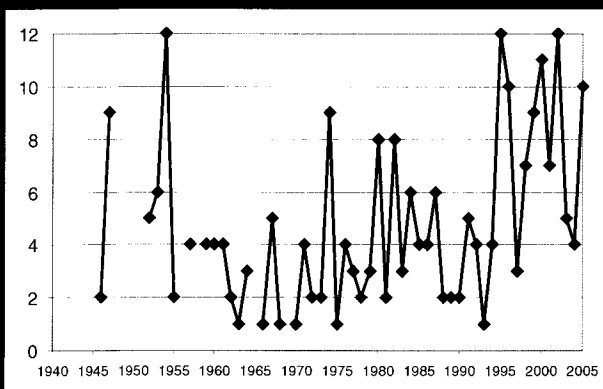
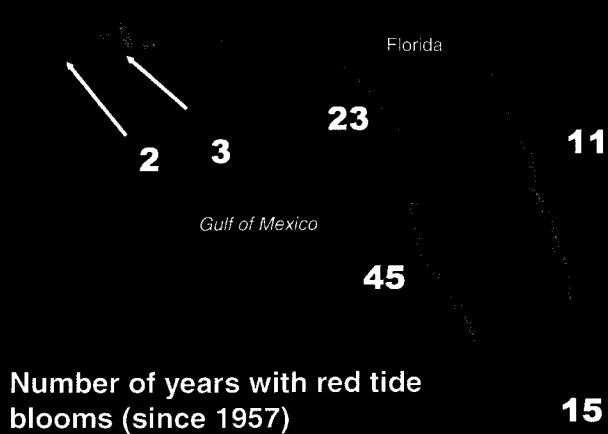


Red Tide Fish Kill

- Naturally occurring phenomenon documented first in 1840's, but possibly as early as 1400's
- Florida red tide organism *Karenia brevis* identified in 1947
- Produces toxin that kills fish, birds, manatees, dolphins
- Filter feeding shellfish (clams, oysters, mussels) accumulate toxin and can cause Neurotoxic Shellfish Poisoning (NSP) in human consumers
- Toxin is carried in aerosol form in sea spray and causes respiratory irritation in humans
- Massive fish kills on beaches create aesthetic problems, economic losses and high clean up costs



- Initiate offshore in the Gulf of Mexico
- Winds and currents transport inshore
- Red tides most common in SW FL
- Under certain conditions, Atlantic Coast impacted
- Other Gulf states and Mexico also affected



Number of months with red tide in Southwest Florida (1947-2005)

- Red tide is always present in low levels offshore
- Blooms are most frequent from August – February
- Documented in every month of the year
- Severity of red tides highly dependent on winds and currents
- Some indication of increasing frequency in recent years



- Determining the relationship of red tides to land-based nutrient input is an active area of research
- Red tides are not detectable by satellite until the blooms reach significant size
- Available historical data is often not suitable for cause-effect analyses
- Recent advances in technology rapidly advancing the science



*Offshore Monitoring Buoys*



*Inshore Monitoring Platforms*

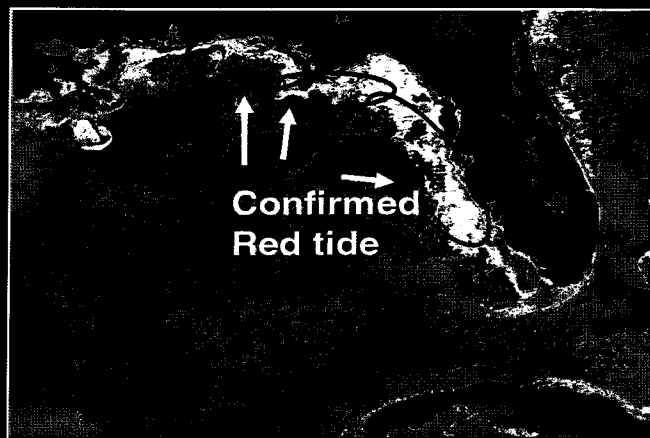


*Autonomous Underwater Vehicles*



- Began January 2005 offshore
- January-August persistent in SW FL
- Since August spread north and south
- One of the most prolonged red tides on record
- Now patchily distributed in SW FL

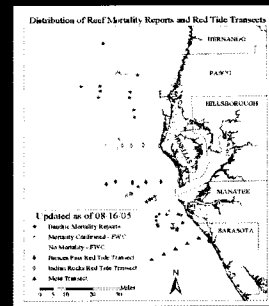
Satellite Image from September 25, 2005







- Pinellas County in state visitation down 11% in August
- Manatee County hotel occupancy down >13% in September
- Numerous lodging cancellations at SW Florida Hotels
- Thousands of tons of dead fish removed from coastal counties



- Monitoring, Event Response and Forecasting:

Monitoring for shellfish management (DACS), including aquaculture sites.

Monthly surveys to assess conditions for red tide development

Rapid response HAB event surveys to investigate and analyze blooms.

Continuous remote sensing for monitoring and forecasting.

- Technology Development:

Develop new techniques for detection and identification of HAB species and toxins.

Investigate innovative techniques for mitigating harmful effects.

- Fate and Effects of Toxins:

Public Health: Respiratory impact, contaminated seafood, dead fish.

Natural Resources: Marine mammal, sea turtle, bird, and fish kills.



- Red tide presents a public safety threat via the consumption of contaminated shellfish

- 2005 Shellfish Closures

- Apalachicola Bay closed

- beginning of September, 2005

- Clam aquaculture in SW Florida and Cedar Key

- Economic losses estimated at ~ \$10,000,000 per month

- Unknown but likely substantial losses to commercial and recreational fisheries.

- Florida Fisheries valued at >\$6.5 billion annually



- Since January, 2005 344 reports of marine life kills due to red tide

- Massive fish kills in SW Florida

- Fish kill reports from every Gulf coastal county (Escambia – Monroe)

- Decaying red tide caused low dissolved oxygen conditions resulting in reef mortalities off SW Florida

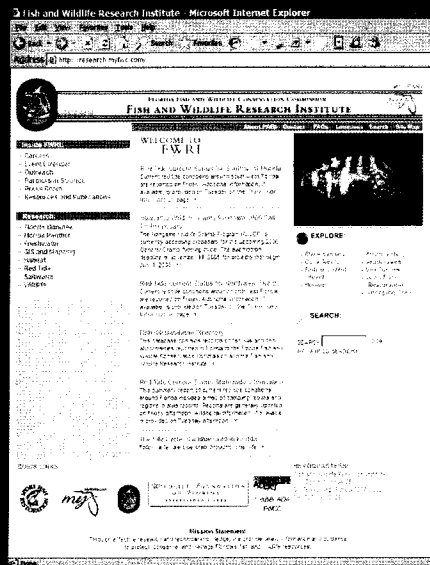
- 69 manatees killed; 178 dead or debilitated sea turtles since July



- Red Tide Alliance
- Educational materials for business owners
- Expansion of citizens support
- Solutions to avoid red tide (START) – 5 active chapters



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- Select a region to view its status:  
(dots represent sampling points):
- Karenia brevis** Counts, October 9-13, 2005
- Northwest Region
- Central Region
- Southeast Region
- East Region
- Key West
- 0 25 50 100 Miles
- Legend:
- NOT PRESENT
  - PRESENT (1,000 cells or less)
  - VERY LOW (1,001 to 10,000)
  - VERY LOW (5,000 to 10,000)
  - LOW (10,000 to 40,000)
  - LOW (40,000 to 100,000)
  - MEDIUM (100,000 to 1,000,000)
  - HIGH (1,000,000)





## Florida Red Tide and Human Health Top 10 Questions

Andrew Reich, MS, MSPH  
Program Coordinator  
Aquatic Toxins Program



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- Red Tide is a recurring problem along Florida's shores
- Red tide toxins can cause rashes, air way irritation and shell fish poisoning
- The grant-funded DOH Aquatic Toxins program coordinates surveillance and public health research

Florida Department of Health Aquatic Toxins Program

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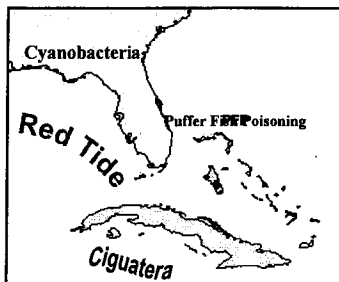
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## Aquatic Toxins Program



- Surveillance
- Research
- Education
- Public Health Strategies

Florida Department of Health Aquatic Toxins Program

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**CDC**  
 National Center for Environmental Health  
 Division of Environmental Hazards and Health Effects  
 Health Studies Branch

***Harmful Algal Blooms and Marine Toxins in Florida***  
 Grant #U50-CCU423360-01

**Through September 30, 2006**

Florida Department of Health Aquatic Toxins Program

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**Potential Exposure Pathways**

Direct Skin Contact

Ingestion of Contaminated Food

Inhalation of Aerosols

Florida Department of Health Aquatic Toxins Program

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### Question 10

Is it safe to eat fish during a Florida red tide?



YES!!

> As long as the fish acts 'normal' on the hook - vigorous/fighting

> Eat ONLY the filleted meat - no organs/entrails

Florida Department of Health Aquatic Toxins Program

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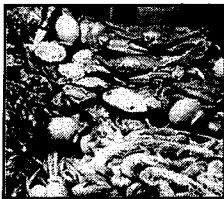
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### Question 9

Can I order/eat seafood in a restaurant when there is a red tide?



YES!!!!

Florida has a very effective shellfish monitoring program and commercially purchased shellfish is safe to eat!

Florida Department of Health Aquatic Toxins Program

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### Question 8

Can I go out shell fishing during a red tide?



NO! During red tides, the non-commercial shellfish beds are not safe. To know areas affected, see the website at:

[www.floridaaquaculture.com](http://www.floridaaquaculture.com)

Florida Department of Health Aquatic Toxins Program

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### Question 7

If I cook the seafood, will heat deactivate the toxin?



NO! The toxins are resistant to heat and storage – so if the shellfish have toxins in them – you will get sick.

Florida Department of Health Aquatic Toxins Program

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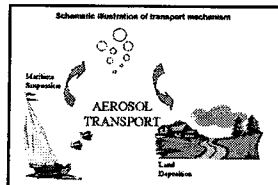
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### Question 6

Do the red tide toxins travel inland from the beach?

Yes. Toxins have been found from 1 to 3 miles from the shore!



Florida Department of Health Aquatic Toxins Program

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### Question 5

Is it OK to swim during a red tide?

A qualified yes. The red tide toxin MAY cause a skin rash.

Also, its unknown what bacteria are in the water when there are a lot of dead fish.



Florida Department of Health Aquatic Toxins Program

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### Question 4

Is there a time of day when there is less red tide in the air?

When winds are OFFSHORE less toxins will be in the air at the beach.



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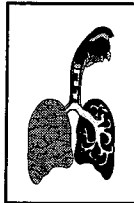
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### Question 3

My husband and I are both healthy people, but when we go to the beach during red tides, we cough a lot. Is it safe?

Yes.

- Lung function fine.
- Upper airway symptoms (cough, throat irritation), eye tearing.



Florida Department of Health Aquatic Toxins Program

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### Question 2

My neighbor jogs every day on the beach, even during red tide. Is it safe?

Yes.

- During exercise ...

Upper airway symptoms only



Florida Department of Health Aquatic Toxins Program

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### Question #1

My sister has asthma, should she go to the beach during red tide?

Studied ~120 participants with asthma or chronic lung disease.

Increase in cough, wheezing, chest tightness, throat irritation, eye irritation after 1 hour walk on the beach.

Decrease in lung function parameters for asthma. No asthma attacks! Just a small decrease.

Florida Department of Health Aquatic Toxins Program

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### The Top Ten Again!

10. Is it safe to eat fish during a red tide? YES!

9. Can I order/eat seafood in a restaurant when there is a red tide? YES!

8. Can I go out shell fishing during a red tide? NO!

7. If I cook the seafood will heat deactivate the toxin? NO!

Florida Department of Health Aquatic Toxins Program

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6. How far inland do the red tide toxins travel?  
1-3 miles with right conditions.

5. Is it OK to swim during a red tide?  
A qualified yes.

4. Is there a time of day when there is less red tide in the air?  
Check the marine forecast for offshore winds.

Florida Department of Health Aquatic Toxins Program

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3. Is it safe for healthy people to the beach during red tides?

Yes, but they may experience some upper airway symptoms.

2. Is it safe to exercise at the beach during a red tide? Is it OK?

Yes, but they may experience some upper airway symptoms.

Florida Department of Health Aquatic Toxins Program

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1. Is it safe for a person with asthma, to go to the beach during red tide?

A careful yes- considering:

- ✓ the severity of her asthma
- ✓ her current health (head cold, allergies, etc)
- ✓ the marine forecast (offshore vs. onshore winds, wind speed),
- ✓ and the severity of the red tide bloom.

Florida Department of Health Aquatic Toxins Program

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> If the smell of rotting fish doesn't make you ill, breathing red tide toxins or eating affected oysters surely will!

> Red tide is a recurring problem along Florida's shores and there remains much to learn. Because red tide impacts human health, the DOH through grant funding provides surveillance and research.

Florida Department of Health Aquatic Toxins Program

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## **Aquatic Toxins Program**

**Andrew Reich**

**Program Coordinator**

**Division of Environmental Health**

**(850) 245 - 4444 Ext. 2295**

**Email: [andy\\_reich@doh.state.fl.us](mailto:andy_reich@doh.state.fl.us)**

**[www.myfloridaeh.com](http://www.myfloridaeh.com)**

Florida Department of Health Aquatic Toxins Program

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